

Session 4: Module 6 - Demographics - Income Part 3 - Income	
FINAL	
Description	Text
1. Introduction	Welcome to M-SPIRIT Session 4, Module 6 , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Income – Part 3
3. Income	Income Screening
4. Income1	Once you've determined an applicant or participant is not adjunctively eligible, you should then proceed with traditional income screening based on household size, gross income and the WIC income guidelines.
5. <income>	Ponderosa's son, Jack, was certified today and is on Medicaid, so is therefore individually adjunctively eligible.
	However, since we are certifying mom Ponderosa at the same time, we also need to assess the household income.
	Click on the Income Calculator.
6. <income1>	We are going to shift our view of the screen again...
7. <income1a>	No script.
8. <income1b>	No script.
9. <income2>	Non-breastfeeding mom Ponderosa does not participate in any programs that would make her adjunctively eligible.
	So we need to assess the household income eligibility using traditional income screening based on the WIC income guidelines.
	We are going to add an income record by clicking the Add Item button.
10. <income3>	The Add Income Line Item window functions like a calculator.
	Each radio button in the Payment Frequency section enables specific fields for calculating different income frequencies.
	The default Payment Frequency is Monthly.
	Click the Hourly radio button...
11. <income4>	...and the Amount per Hour and Hours per Week fields are enabled.
	Click Weekly...
12. <income5>	...and the Amount per Week field is enabled.

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	Click Monthly...
13. <income6>	...and, as we saw before, the Amount per Month field is enabled.
	Click Bi-Weekly...
14. <income7>	...and the Amount per Period field is enabled.
	Now, click Semi-Monthly.
15. <income8>	...and the same field, Amount per Period, is enabled.
	Lastly, click Yearly...
16. <income9>	...and the Amount per Year field is enabled.
	It should be noted that M-SPIRIT does not accept negative income amounts.
	Mom Ponderosa has provided us with information about two different incomes.
	The first is an hourly wage. Click on the appropriate radio button.
17. <income10>	You do not have to type a decimal or space over to the decimal in the Amounts fields.
	The only time you have to enter a decimal is if there is a cents value, such as \$10.57.
	Otherwise, M-SPIRIT can figure it out.
	According to Mom Ponderosa's paystub, she earns \$8.00 per hour and works 25 hours per week.
	Click into the Amount per Hour field.
18. <income11>	Type the amount and press your Tab key or click into the Hours per Week field.
19. <income12>	Enter the number of hours per week, which is 25. Then click on the Proof of Income drop-down arrow.
20. <income13>	Select Pay Stub, since that's what she brought in to prove her income.
21. <income14>	<no script>
22. <income17>	M-SPIRIT auto-calculates the Total Amount per Month based on the payment frequency and dollar amount.
	Click OK to save the income record and exit the window.

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23. <income18>	The income record is displayed in the Income Information grid.
	Notice the income has also been populated into the household level of the Income Screening Contacts section.
	Mom Ponderosa also receives child support.
	Each income must be entered separately.
	How do you think you add the second income?
24. <income19>	Since she receives \$300.00 for child support every month, we can stick with the default Payment Frequency.
	Click into the Amount per Month field.
25. <income20>	Enter her child support amount and click on the Proof of Income drop-down arrow.
26. <income21>	Select the Proof of Income.
27. <income22>	<no script>
28. <income23>	Click the OK button to save and exit.
29. <income24>	Again, the income information populates both the Income Screening Contacts section and the Income Information grid.
30. Income2	The Edit Item and Delete Item buttons are enabled once an income record has been added.
	You can only edit or delete income records on the same date they were created.
	This can be done in either the CGS or the participant folder on that day.
31. <income25>	Let's edit the second income record. Instead of \$300.00 per month, it should have been \$350.00.
	In order to edit, you must select the income in the Income Information grid to highlight it. Go ahead and do that.
32. <income26>	Click the Edit Item button.
33. <income27>	The information from the selected income record defaults into the appropriate fields.
	Click into the Amount per Month field.
34. <income28>	Enter 350 and click the OK button to save the change.
35. <income29>	Your edited information is updated immediately in both the Income Screening Contacts section and Income Information grid.

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	To delete a record, again it must first be highlighted in the Income Information grid.
	If we wanted to delete the first income record, we would simply click the Delete Item button since it is already highlighted.
	Go ahead and click the button.
36. <income30>	A verification message opens to ensure that you do want to delete the income record.
	Typically, you would click Yes which would cause the income record to be deleted and all of the information updated on the screen.
	However, we are going to keep this income record. So, click No.
37. <income32>	Click on the OK button to save.
38. <income33>	Notice the household Monthly Income displays.
	Let's go back into the Income Calculator one more time. Click the icon.
39. <income34>	Hovering the mouse over the income records we can see...
40. <income35>	...both the household income record and the...
	...individual adjunctive eligibility record for Jack.
41. <income37>	Since we don't want to make any further changes to the income record, click the Cancel button to exit.
42. <income38>	<no script>
43. Tribal	Native American Households On Indian Reservations
44. Tribal1	Under specific circumstances, Native Americans can Self Declare their income without providing proof of income.
	The WIC Clinic must be a tribal WIC Clinic.
	In order to choose Self Declare, at least one household member must be an enrolled tribal member <u>of that reservation.</u>
	For example, a member of the Salish Kootenai tribe cannot Self Declare when they live on the Crow Reservation. Only a member of the Crow tribe can self declare on the Crow Reservation.
	You must scan in the Tribal ID Card.
	The applicant must state all income and meet the WIC income guidelines to be eligible, but...
	The applicant need not provide proof of income, you can choose "Self Declare..." under Proof of Income.

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45. Glitch	Income is typically saved at the household level, which means you can enter it into the Income Calculator in the CGS for one member and all members being certified on that date will have their income contact completed.
	However, when certifying multiple household members, if more than one member's Demographics screen in the CGS is opened at the same time that the income record is created, the system will not register it as having been completed for the other household member's.
46. Glitch1	At the end of the CGS, you will receive a message indicating that an income contact is still required.
	The work-around if this occurs, is to re-open the Demographics screen for those members still requiring an income record, open the Income Calculator, click OK and exit Demographics.
47. Remember	You can avoid this by remembering to open only one member's Demographics in the CGS, documenting the Household income, and closing that member's Demographics before opening any other member's.
48. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.